

## Chapter 3: Using SEER\*DMS

SEER\*DMS uses an HTML-based interface displayed via a Web browser. Mozilla Firefox (version 2.0 or later) or the web browser in the Mozilla Suite (version 1.7.13 or later) are the only browsers currently supported. Reports generated by SEER\*DMS are designed to be viewed and printed as PDF files. Adobe Reader is required to view or print reports (version 7.0 or later is recommended).

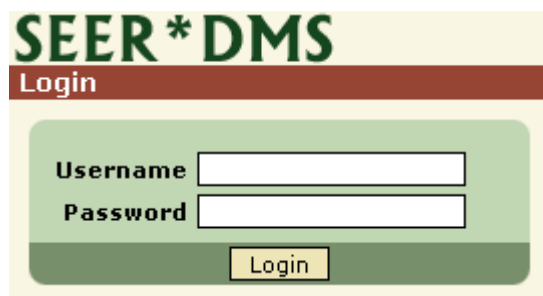
In this chapter, you'll learn about

- Logging into SEER\*DMS
- Changing Your Password
- Using the Home Page
- Worklist Summary
- SEER\*DMS Menus
- SEER\*DMS Dos and Don'ts
- Page and Calendar Tools
- Setting Account Preferences
- Adding and Editing News Items
- Automatic Logoff Due to Inactivity
- Viewing More Information on Your Screen
- Viewing Two Screens at Once
- Searching for Text
- Browser Navigation Settings
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- Recommended Firefox Options

### Logging into SEER\*DMS

To access SEER\*DMS, direct your web browser to the address provided by your registry's system administrators. In most cases, a shortcut will be available on your desktop. A system administrator must set up a SEER\*DMS account for each new system user. Once your account is created, a username and randomly generated password will be e-mailed to you. (When the system is first installed at your registry, usernames and passwords will be assigned and provided to you during training.)

When you access SEER\*DMS, the **Login** page will be displayed as shown below. Note: The colors used in SEER\*DMS are determined by the Color Scheme selected in your Account settings.



Enter your **Username** and **Password**. Click **Login**. Once you have successfully logged in to SEER\*DMS, the Home page will be displayed. You should immediately change your password. Do not continue to use a password that was assigned to you or sent via e-mail. Please refer to the *Changing Your Password* section of this chapter.

*If your login attempt is unsuccessful:*

- User names and passwords are case sensitive. Make certain **Caps Lock** is turned off.
- Contact your supervisor to determine whether your account has been deactivated, or if you are subject to a login restriction.
- If you have forgotten your password, contact a system administrator to reset your password. A new, randomly generated password will be e-mailed to you. You should immediately log in and change your password to something you will remember.

*Login restrictions:*

- If you are unable to log in to SEER\*DMS, your account may be subject to a **Business Hours Restriction**. This restriction blocks access to the system outside of the registry's standard hours of operation. Your registry's system administrators have the ability to specify the standard business hours in the system configuration settings.

It is strongly recommended that you log off SEER\*DMS when you are not using the system. If you do not log off, confidential data may be displayed on your monitor or be accessible from your computer. Save your current work, if necessary. To log off, click the **Logoff** link which appears in the top right corner of each page. Your session will be ended and the Login page will be displayed.

## Changing Your Password

When logging in for the first time or when your password is reset, you should change your assigned or randomly generated password to a secure password that is easy for you to remember.

SEER\*DMS provides access to confidential data. It is your responsibility to protect and maintain your password according to registry policy. If you forget your password, a system administrator can reset it. Your password will be set to a random string and you will be notified of the change via e-mail. Log in with the new password and immediately change your password.

*To change your password:*

1. Click the **Account** link in the User Bar at the top right corner of the page.
2. Enter your **Old Password**.
3. Enter a **New Password**. All passwords must be at least six characters in length. Security measures to protect the confidentiality of patient data must include the use of strong system passwords. Your password should:
  - a. Include symbols, digits, and letters of both upper and lower case. You should use at least one symbol or character in a position other than the first or last character.
  - b. Be significantly different from passwords that you have used in the past.
  - c. Not include your name, your username, your child's name, or your pet's name.
  - d. Not be a common word or name.
4. Re-enter your new password in the **Verify Password** field.
5. Click **Save**. Your new password will be effective immediately.

Your password may also be reset by an administrator for security reasons. In this case, an e-mail containing your new password will be automatically sent to the e-mail address associated with your account. You should immediately log in and change this password as described above.

## Using the Home Page

Each time you log in to SEER\*DMS, you will start at your personalized **Home** page. This page is your gateway to the specialized tools and features in the system. At any time, you can return to the home page by clicking the SEER\*DMS logo in the banner or selecting **View > Home**.

- A summary of the worklist is displayed on the left side of the home page. The links and counts are described in the Worklist Summary section of this chapter.
- The **Latest News** section displays News items posted by registry staff.
- The version of the SEER\*DMS software is displayed at the bottom of every SEER\*DMS screen. The date and time of the build are displayed in parentheses.
- The **SEER\*DMS Logo**, **User Bar**, and **Toolbar** appear at the top of every page in the system.
  - Click the **SEER\*DMS Logo** to return to the home page from any page in the system.
  - The **User Bar** includes your user name, access to Help and Account Preferences, and the Logoff link. If you have a system permission to view or edit patient data, it will also include the "Lookup" search box. Please refer to *Chapter 20: Searching for Records and Patients* for information about the toolbar quick search and other searching techniques.
  - The name of the current page is displayed in the left side of the **Toolbar**. The Toolbar also includes menus that provide access to all pages and features in the system (see the *SEER\*DMS Menus* section of this chapter).
  - To avoid the loss of effort when using these features, follow the guidelines specified in the *SEER\*DMS Dos and Don'ts* section of this chapter.

## Worklist Summary

| <b>Worklist</b>   |   |
|---|---|
| <b>My Tasks</b><br><br>2 <a href="#">Consolidate</a><br>4 <a href="#">Match-Consolidate</a><br>3 <a href="#">Report Output</a><br>2 <a href="#">Resolve Patient Set Errors</a><br>3 <a href="#">Resolve Record Errors</a><br>4 <a href="#">Screening</a><br>3 <a href="#">Visual Edit Patient Set</a> | <p>A personalized worklist summary is displayed on the left side of the home page. <b>My Tasks</b> summarizes the tasks assigned to you and provides shortcut links to those tasks. Click <b>Worklist</b> to view a list of all tasks assigned to you. Click one of the task types in <b>My Tasks</b> to view tasks of that type that are assigned to you.</p> <p>The number of tasks currently assigned to you is displayed to the left of the task type. For example, in the sample shown on the left, two Consolidate tasks are assigned to the user. Clicking on the <b>Consolidate</b> link in this sample will bring up a filtered <b>Worklist</b> showing the two Consolidate tasks which are currently assigned to this user.</p> |

|  |   |
|--|---|
| <div> <div>Unassigned Tasks</div> <div> 2 <a href="#">Consolidate FUP</a><br/> 2 <a href="#">Import Problems</a><br/> 339 <a href="#">Match-Consolidate</a><br/> 27 <a href="#">Resolve Patient Set Errors</a><br/> 46 <a href="#">Resolve Record Errors</a><br/> 24 <a href="#">Screening</a> </div> </div> | <p>The <b>Unassigned Tasks</b> list on the Home page summarizes the unassigned tasks that you are permitted to access, and provides shortcut links for each type of task. The number of tasks per type is displayed to the left of each link. In the example shown on the left, there are 339 unassigned Match-Consolidate tasks.</p> <p>Clicking on the <b>Screening</b> link in this sample will bring up a filtered <b>Worklist</b> that displays the 24 Screening tasks which are unassigned.</p> |
|--|---|

## SEER\*DMS Menus

A **Toolbar** is displayed on every page in SEER\*DMS.

|      |        |          |          |
|------|--------|----------|----------|
| Home | View ▼ | Manage ▼ | System ▼ |
|------|--------|----------|----------|

The name of the current page is always displayed on the left of the toolbar. On the right, the toolbar displays pull-down menus which you can use to navigate the various features of the SEER\*DMS system. Some menu items are only displayed if the user has the system permission associated with the menu item. A full list of menu options is shown below.

- **View**
  - Home
  - Worklist (*Chapter 4: Using the Worklist*)
  - Patients (*Chapter 20: Searching for Records and Patients*)
  - Contacts (*Chapter 19: Maintaining the Contact List*)
  - Organizations (*Chapter 18: Maintaining the Organization and Facility List*)
  - Reports (*Chapter 24: Creating Reports and Extracting Data*)
  - Help
- **Manage**
  - Abstract Facility Lead (*Chapter 21: Managing Abstracting Assignments*)
  - Active Follow-up (*Chapter 16: Follow-up*)
  - Follow-back (*Chapter 22: Follow-back*)
  - Record Request (*Chapter 23: Submitting a Request to a Facility for Records*)
  - Special Studies (*Chapter 28: Special Studies*)
- **System**
  - Staff (*Chapter 25: Managing User Accounts*)
  - Roles (*Chapter 26: System Roles*)
  - Import (*Chapter 5: Importing Data Files and Chapter 6: Data Entry*)
  - Tasks (*Chapter 27: System Administration*)
  - Administration (*Chapter 27: System Administration*)

## SEER\*DMS Dos and Don'ts

Since SEER\*DMS is a Web-based system, you will modify data and access features on system "pages". You must use the page buttons to exit pages that enable you to make modifications to patient or system data. These buttons include "Save & Exit", "OK", "Close", and "Cancel". If you

use the links or menus in the User Bar or Toolbar to go to another page, changes made on the current page will not be saved. Likewise, if you exit a page by using your browser's navigation controls, unsaved changes will not be saved. This may be a new concept for some users. If you use the Internet, you have probably become accustomed to this behavior. For example, if you are purchasing airline tickets on an Internet site but change your mind before clicking "Buy", going to another Web site will void the incomplete transaction.

#### Do

- Use the links, buttons, and menus located in the body of the page to complete the current task. If you have made changes that must be saved, do not use the navigation in the SEER\*DMS logo, User Bar, or Toolbar to exit a page.
- Click the SEER logo to return to the home page, but only if you saved any changes made on the current page or do not wish to save them.
- Use the links and menus in the User Bar and Toolbar to access system features, but only if you have already saved changes made on the current page or do not wish to save them.

#### Don't

- Don't use any browser controls to navigate. Never use the Back button, Forward button, or enter a URL in the address box. The *Setting Browser Preferences* section of this chapter provides more information about the browser controls to avoid; and methods for hiding navigation features that you should not use.
- Don't use the backspace key unless you are editing a field. In a browser application, backspace is a shortcut for the browser's Back button.
- Don't use the links or menus in the User Bar or Toolbar when you have made changes that must be saved. (Note: The Help link and menu item are exceptions to this rule. The SEER\*DMS Help System opens in a separate window, your work will be unchanged and will continue to be displayed in the original window.)
- Don't click the SEER\*DMS logo to return to the home page when you have made changes that must be saved.


Note: SEER\*DMS is a Web-based application that is maintained on a server located within the registry. The system is not connected to the Internet. Access to the system from remote locations is controlled by a firewall configuration designed, installed, and maintained by registry IT staff.

## Page and Calendar Tools

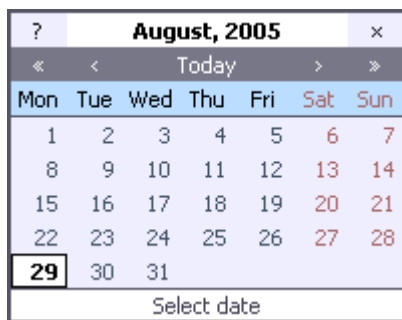
The lists in SEER\*DMS, such as the Worklist, often contain too many results to fit on the screen all at once. In these cases, the list will be broken into several pages. Use the Page Selection links displayed at the top or bottom of the list to navigate the list, as in the example below.

[[First/Prev](#)] [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#) [[Next/Last](#)]

Click **Prev** or **Next** to advance one page back or forward. Click **First** or **Last** to move to the beginning or end of the entire list. Click an individual page number to jump to a specific page. A maximum of eight page numbers will be displayed; there may be additional pages that are not listed. Additional page numbers will be displayed when you click the eighth page in the current set.

The calendar tool can be used to enter a correctly formatted date in the field adjacent to a calendar icon: 

Click on the icon to bring up a calendar of the current month. The calendar will open with the current date highlighted, as shown below.



To browse by month, use the < and > buttons at the top of the calendar. Use the << and >> buttons to browse by year. Use the mouse to click a specific date. This date will be automatically formatted and displayed in the adjacent date field.

To close the calendar without selecting a date, click the x button in the upper right corner.

## Setting Account Preferences

*To modify your account information:*

1. Click the **Account** link in the User Bar at the top right corner of the page.
2. You may edit the **First Name**, **Last Name**, and **E-mail** address fields. These are required fields and cannot be blank. **Note:** Your username cannot be modified.
3. Add or modify your phone number and street address, if appropriate.
4. You may change to one of several **Color Schemes** available in SEER\*DMS.
5. If you add a **Signature**, it will be displayed in e-mail communications sent via SEER\*DMS.
6. To change your password:
  - a. Enter your **Old Password**.
  - b. Enter a **New Password**. All passwords must be at least six characters in length.
  - c. Re-enter your new password in the **Verify Password** field.
7. Click **Save**.

## Adding and Editing News Items

System permissions: *news\_add, news\_edit, news\_delete*

To make an announcement to the entire registry staff, you can add a news item to the Home page. The **Latest News** list displays messages in the order in which they are added, with the most recent item appearing at the top of the page. All SEER\*DMS users can view the news list, but system permissions are required to add, edit, or delete news.

*To add a News Item:*

1. Select the **Add Item** link at the top of the **Latest News** list.
2. Enter a **Title** for your news item. This field can hold a maximum of 100 characters.
3. Enter the text of your message in the **Body** field. You may enter up to 4000 characters in a news item.

4. Click **Save**. Your message will appear at the top of the news list.

*To edit a News Item:*

1. Click the **Edit** link displayed below the news item's title bar.
2. In the Edit News Item page, you can edit the text of the **Title** and **Body**.
3. Click **Save** to save your changes.

*To delete a News Item:*

1. Click the **Delete** link displayed below the news item's title bar.
2. SEER\*DMS will query you to confirm that you really want to delete the item. Click **OK** to delete the item or click **Cancel** to return to the Home page.


*To send an email to the author of a news item:*

1. Click the **Author's Name** displayed below the news item's title bar.
2. SEER\*DMS will open your email client software and create a blank message addressed to the author of the news item. Complete and send the email message.

## Automatic Logoff Due to Inactivity

SEER\*DMS will automatically end your session and log you off after a long period of inactivity. The last screen that you viewed will continue to be displayed on your monitor and may include confidential patient data. Therefore, it is strongly recommended that you use the logoff link to end your session when not using the system.

The system is initially configured to end your session after two hours of inactivity; however, the length of time can be changed by registry system administrators. (It is recommended that this time period not be set to a value less than one hour, to avoid the loss of unsaved work.)

Note: Moving the mouse and entering text do not constitute activity between the browser and the SEER\*DMS server. Until you click a button, link, or  lookup to perform an action or access another page, your session will be considered inactive.

After automatic logoff, any open SEER\*DMS pages will continue to be displayed as long as your browser is open. If you click on any button or link in the SEER\*DMS window, the system will attempt to restore your session after prompting you for your username and password. However, any unsaved changes to a record or patient set may be lost.

## Viewing More Information on Your Screen

The data pages in SEER\*DMS often contain too many data items to display on your monitor without scrolling. If you would like to view more information on your screen at one time, you may want to consider the following:

- The Firefox and Mozilla browser's have a "Full Screen" feature that enables you to hide toolbars and controls that use valuable screen real estate. Press F11 to view SEER\*DMS in full screen. Your Windows taskbar and browser menu will be hidden, and a larger number of data fields will be displayed. Press F11 again to restore the Windows taskbar and browser menu.
- Monitors commonly use a landscape orientation. However, many flat LCD monitors can be pivoted to portrait orientation. If you view data pages in portrait orientation, a substantially larger number of fields will be displayed without scrolling.

- SEER\*DMS requires a minimum resolution of 1024x768. Using a higher resolution will reduce the scrolling when editing data pages, but is not required.

## Viewing Two Screens at Once

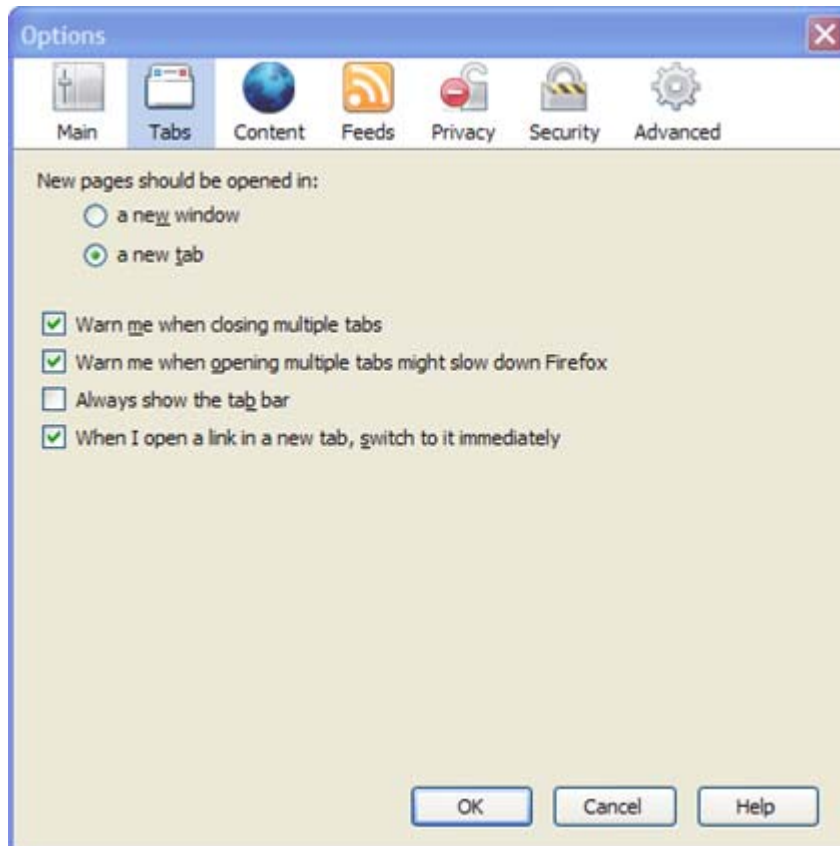
SEER\*DMS supports the viewing of two pages during a single session. The second page will open in either a new Window or Tab, depending on your Firefox option settings. Windows are more likely to be hidden; therefore, it is recommended that you set Firefox to open new pages in a new tab within a single Firefox window.

*To open a second SEER\*DMS page:*

1. "Middle-click" a link or menu item in SEER\*DMS. If you have a mouse wheel, clicking the wheel is the equivalent of middle-clicking.

*To set Firefox to open new pages in a new tab:*

1. From the Firefox **Tools** menu, select **Options**.
2. Click the **Tabs** icon at the top.
3. The settings shown in the figure below are recommended. In particular, you should:
  - a. Select "**New pages should be opened in a new tab**".
  - b. Check "**When I open a link in a new tab, switch to it immediately**".
4. Click **OK** to save and exit. All of the Tabs settings are described in the Firefox help system.





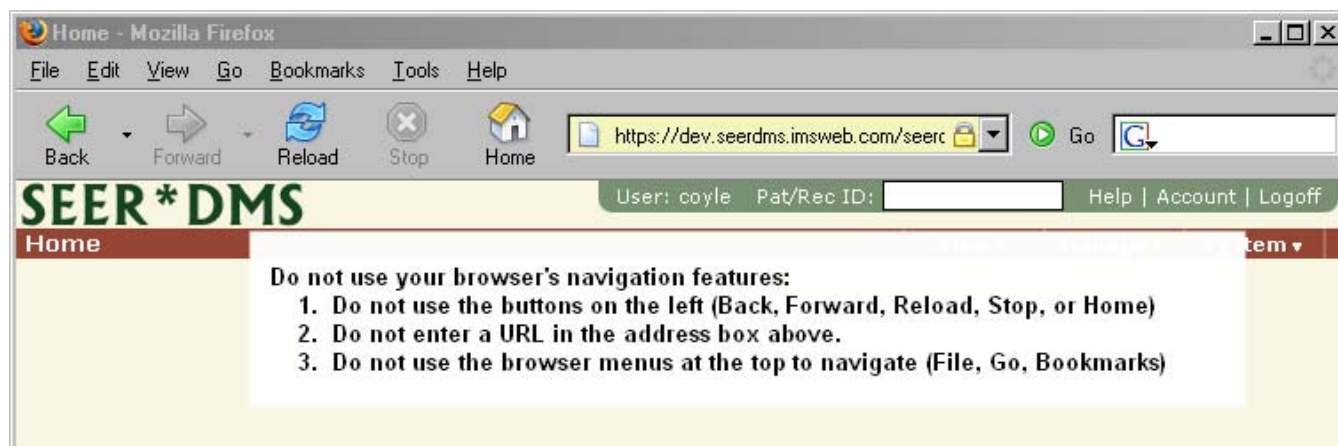
## Searching for Text

In Firefox, CTRL-F can be used to search any window. This is a great tool to use when searching for a field in the Patient Set Editor or when searching for text in a popup window.

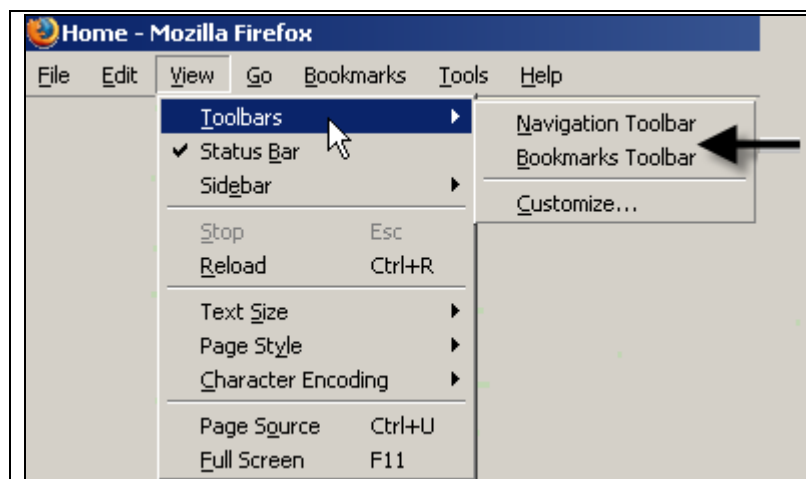
1. Press **CTRL-F**
2. Enter the search text in the bottom part of the window. The first occurrence of the text will be highlighted.
3. Click **Find Next** to go to the next occurrence of the search string or click **Highlight All** to see all matches.

## Browser Navigation Settings

The following diagram shows SEER\*DMS in a window that includes the browser's navigation controls. The browser menus appear under "Home - Mozilla Firefox" at the top of the page. Navigation buttons (Back, Forward, Reload, Stop, and Home) and the address box are shown just under the menus.



You should *not* use the browser's navigation buttons to change pages in SEER\*DMS. It is recommended that you hide the browser icons to provide additional space for SEER\*DMS and to avoid using the buttons inadvertently. These buttons change your page view, but SEER\*DMS does not recognize these commands and your work will not be saved.



On the **View** menu in Firefox, select *Toolbars*. To show or hide a toolbar, simply click its menu item.

Make sure that both the *Navigation Toolbar* and *Bookmarks Toolbar* are not checked.

## Display Recommendations

SEER\*DMS requires a minimum resolution of 1024x768. Using a higher resolution will reduce the scrolling when editing data pages, but is not required. The browser's default or "normal" text size should be used. Images, buttons, and text may be misaligned if the Text Size is increased.

*To set the text to Normal in Firefox:*

1. From the Firefox **View** menu, select **Text Size**.
2. Click **Normal**.



## Recommended Firefox Options

As is true of most Web browsers, Firefox "remembers" passwords and information entered into a form in order to provide suggestions when completing similar forms in the future. For increased security of the confidential patient data in SEER\*DMS, you should disable the option to save passwords. To avoid entering one patient's data into another patient's form, you should disable the browser options to remember information previously saved in forms. Recommendations for options related to Tabs were discussed in the *Viewing Two Pages at Once* section of this chapter (the instructions are included here to enable you to set all Firefox options at one time).

*To set the Firefox options as recommended for SEER\*DMS:*

1. From the Firefox **Tools** menu, select *Options*.
2. Tabbed browsing allows you to display multiple SEER\*DMS pages within a single window. To view the pages on separate tabs within a single Firefox window:
  - a. Click the **Tabs** icon at the top.
    - i. Select "**New pages should be opened in a new tab**".
    - ii. Check "**When I open a link in a new tab, switch to it immediately**".
3. SEER\*DMS uses Javascript to display popup windows. To ensure that the Text, DX Info, and other popups are displayed when open:
  - a. Click the **Content** icon at the top.

- i. Verify that **Enable Javascript** is checked.
  - ii. Click the **Advanced** button for **Enable Javascript**.
  - iii. Check the box that says **Raise or Lower Windows**.
4. Click the **Privacy** icon at the top. In the History section, uncheck **Remember what I enter in forms and the search bar**.
5. Click the **Security** icon and uncheck the **Remember passwords for sites** box.

